

CLAIMS

What is claimed is:

1. An information management system, comprising:

a depository, said depository providing for a plurality of data storage sources, a plurality of files, a plurality of source applications, and at least one interesting file, wherein each said data storage source provides for at least one said file, wherein said interesting file is one of said plurality of files, and wherein said files and said interesting file are created from said plurality of source applications;

an analysis application, said analysis application providing for a search tool, a search parameter, and a processing rule, wherein said search parameter is generated with said analysis application for said search tool in accordance with said processing rule, wherein said search tool uses said search parameter to selectively identify said interesting file from said plurality of files, and wherein said analysis application is not one of said source applications; and

a database, providing for a goal-specific record, wherein said goal-specific record includes an attribute not found within said interesting file, wherein said analysis application provides for creating said goal-specific record by retrieving information included in said interesting file in accordance with said processing rule, and transforming the retrieved information into said goal-specific record in accordance with at least one of said processing rule and said search parameter.

2. The system of claim 1, wherein said depository further provides for a plurality of storage locations, including a first storage location and a second storage location, wherein said first storage location and said second storage location each comprise at least one said data storage source.

3. The system of claim 1, wherein said depository further provides for a plurality of file types, wherein said plurality of file types include a first file type and a second file type, wherein at least one said file in said plurality of files is of said first file type, and wherein at least one said file in said plurality of files is of said second file type.

4. The system of claim 1, said depository further providing for a plurality of file types associated with said plurality of files, said plurality of file types including at least three of: an e-mail, a word processing document, a spreadsheet, a database record within said depository, a web site, a scanned document, and a text file.

5. The system of claim 1, wherein said analysis application is a tax credit application, wherein said processing rule is created from a plurality of tax rules, and wherein said goal-specific record includes a tax attribute not stored within said interesting file.

6. The system of claim 5, wherein said plurality of tax rules is entered into said tax credit application by at least one of: (a) typing in the information through a keyboard; and (b) importing data from a tax information source.

7. The system of claim 6, wherein said plurality of tax rules comprise a plurality of R&D tax rules.

8. The system of claim 7, wherein said R&D tax rules comprise a patent safe harbor tax credit rule.

9. The system of claim 1, further comprising a keyword analysis heuristic, wherein said search tool invokes said keyword analysis heuristic to

identify a plurality of interesting files that exceeds the number of said interesting files that would be identified with solely said search parameter.

10. The system of claim 9, further comprising a past search result, a statistical heuristic, and a modification to said keyword analysis heuristic, wherein said analysis application generates said modification to said keyword analysis heuristic using said past search result and said statistical heuristic.

11. The system of claim 9, wherein said statistical heuristic is performed by at least one of: an artificial intelligence component, an expert system component, a predictive modeling component, or a linguistic analysis component.

12. The system of claim 1, said database providing for a plurality of goal-specific records, said analysis application providing for a report tool and a report generated by said report tool, said report tool providing for a plurality of report parameters, wherein said report tool generates said report from a selectively identified subset of interesting records, wherein said report tool selectively identifies said subset of interesting records with said plurality of report parameters.

13. The system of claim 12, wherein said report parameters do not correspond to said search parameter.

14. An information management system, comprising:
a depository, said depository providing for a plurality of data storage sources, a plurality of files, a plurality of file types, a plurality of source locations, a plurality of source applications, a plurality of organization sub-groups, and a plurality of interesting files, wherein each said data storage source provides for at least one said file, wherein said interesting files are a subset of said plurality of files, wherein said files and said interesting file are

created from said plurality of source applications, wherein said plurality of interesting files include said plurality of file types, wherein said plurality of file types include an e-mail, a word processing document, a spreadsheet, and a web page, wherein said plurality of interesting files are created from said plurality of source locations, and wherein said plurality of interesting files are created from said plurality of organization sub-groups;

an R&D tax analysis application, said R&D tax analysis application providing for a search tool, a plurality of search parameters, and a plurality of tax R&D tax credit processing rules, wherein said search parameter is generated with said R&D analysis application for said search tool in accordance with said R&D tax credit processing rules, wherein said search tool uses said search parameter to selectively identify said interesting files from said files, wherein said R&D tax analysis application is not one of said source applications; and

an R&D tax database, providing for a plurality of R&D tax records, wherein said R&D tax records includes a plurality of attributes not found within said interesting files, wherein said R&D tax analysis application provides for creating said R&D tax records by retrieving information included in said interesting files in accordance with said R&D tax credit processing rules, and transforming the retrieved information into said R&D tax records in accordance with said R&D tax credit processing rules and said search parameters.

15. A method for generating a plurality of tax records from a depository made up of a plurality of files that were not created for the purpose of maintaining tax information, comprising:

creating a depository of information and communications that include a plurality of files stored on a plurality of different that includes a plurality of data storage units;

installing a tax application;

configuring a plurality of tax processing rules, wherein the configuring of the plurality of tax processing rules includes defining a plurality of subject matter categories for linking information to categories of information;

performing a search of the depository using a search parameter created from a user input and at least one tax processing rule; and

populating a tax database with a plurality of tax records from information obtained from the search of the depository, wherein each tax record includes at least one attribute included in file corresponding to the tax record.

16. The method of claim 15, further comprising:

implementing a keyword analysis to expand the scope of the search parameter and the search results.

17. The method of claim 15, further comprising:

invoking a report generator with a report parameter augmented by at least one tax processing rule, submitted by the tax application to the populated database.

18. The method of claim 15, wherein populating the tax database includes invoking a pre-defined patent-safe-harbor R&D tax credit heuristic for identifying information with the various files that can be potentially relevant to establishing an R&D tax credit.

19. The method of claim 15, wherein the files in the depository originate from more than one organization unit.

20. The method of claim 15, wherein the plurality of files include e-mails, word processing documents, web pages, and spreadsheets.